

Goodbody Market Commentary Metrics



14 September 2026																	
Company	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA	
	Tc	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027
All Group	11.64	0.86	0.96	13.2	12.2	1.7	1.7	3.4	3.4	63%	72%	4660.1	4293.1	2327.3	2381.2	288.9	288.9
Air France-KLM	11.64	4.51	5.23	2.6	2.2	3.5	3.5	63%	72%	0.0%	0.0%	35273.5	36004.9	1676.9	1861.4	4879.9	5226.5
Applied Nutrition	287.50	12.46	13.79	23.1	20.8	16.2	13.9	1%	2%	0.0%	0.0%	160.4	205.3	41.8	46.0	43.4	49.2
BBM European Value Re	224.80	22.22	22.53	10.2	9.8	6.5	6.2	12%	9%	4.2%	4.9%	5775.0	5999.3	350.0	371.6	458.0	470.3
Bank of Ireland	20.37	1.63	1.89	12.5	10.8	1.5	1.4			3.9%	4.7%	4419.1	4631.9	1889.5	2098.4		
Barratt Redrow	285.50	29.61	24.94	9.6	11.4	0.5	0.5	9%	7%	5.8%	0.4%	6074.1	6319.0	589.5	474.5	604.8	492.8
Beauty Tech Group	350.00	24.23	27.79	14.4	12.6	7.1	5.7	8%	10%	0.0%	0.0%	170.9	190.1	32.8	37.4	45.4	50.9
Belwey	1981.00	182.17	154.83	10.9	12.8	0.6	0.6	14%	nm	3.8%	4.7%	3147.6	3194.8	322.4	269.3	325.4	272.1
Beckley Group	3284.00	330.87	266.34	11.7	12.3	1.0	0.8	4%	7%	9.1%	2.0%	2382.3	2052.5	449.8	352.1	446.8	368.1
Bredon Group	327.40	29.54	33.09	11.1	9.8	6.6	5.5	9%	10%	4.8%	5.1%	1792.6	1869.8	142.0	154.8	282.1	299.4
C & C Group	101.20	0.10	0.10	16.6	11.8	8.9	7.4	0%	5%	3.4%	4.9%	1569.8	1479.0	70.5	70.5	104.3	104.3
Calm Homes	2.73	0.23	0.25	12.0	10.7	8.5	8.0	4%	8%	4.2%	4.6%	1065.6	1204.2	181.7	200.5	183.8	203.1
Coca-Cola HBC	4494.00	2.93	3.14	17.9	16.6	10.7	9.8	4%	4%	2.5%	2.7%	12465.9	13221.3	1499.8	1621.7	1937.0	2072.2
Compass Group	30.85	1.48	1.63	20.9	18.9	11.5	10.6	4%	4%	2.4%	2.6%	50664.5	54369.0	3739.1	4080.6	5119.0	5487.9
Cranswick	5020.00	301.74	322.29	17.0	15.6	8.9	7.7	3%	3%	2.2%	2.4%	2982.5	3129.0	232.8	250.8	336.4	358.8
CRH	88.55	578.28	632.33	15.3	14.0	9.1	8.3	9%	12%	1.3%	1.8%	39955.1	41932.3	5984.2	6484.6	8248.4	8844.3
CVC	6330.00	437.43	511.23	11.0	12.4	5.3	7.5	12%	8%	4.5%	3.6%	15441.9	18336.2	494.4	563.5	779.3	807.0
Dapco	1603.00	1.65	1.68	13.9	12.9	11.3	10.5	8%	6%	2.2%	2.7%	19543.0	18728.9	590.1	5851.2	6634.0	6334.0
Dole	13.33	129.66	139.84	10.3	9.5	5.4	4.9	9%	13%	2.4%	2.6%	9724.1	9837.0	261.9	270.8	398.9	410.1
easyJet	667.20	8.17	18.19	81.7	36.7	5.7	5.0	nm	nm	2.3%	2.5%	10599.5	11668.6	60.3	235.6	919.7	1255.2
Enstun	502.20	56.52	69.51	8.9	7.2	7.3	6.8	8%	12%	4.1%	4.3%	5106.5	5307.3	675.8	779.2	957.4	1019.1
Evolve	47.50	17.65	FALSE	2.4	FALSE	4.5	FALSE	56%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FBD Holdings	18.70	1.47	1.57	12.7	11.9	1.4	1.4										
Fever-Tree Drinks	788.00	29.56	39.59	26.7	19.9	16.6	12.8	4%	7%	2.4%	2.5%	404.0	440.0	36.5	50.1	50.0	64.0
Flatter Entertainment	100.56	5.78	9.38	17.5	10.7	10.0	7.3	4%	8%	0.0%	0.0%	18338.1	20586.3	2043.9	2887.9	2777.4	3711.1
Forterra	136.60	10.46	11.91	13.1	11.5	7.2	6.0	10%	11%	3.8%	4.4%	369.7	391.4	33.8	38.1	54.1	59.6
Fuller, Smith & Turner	692.00	47.18	52.77	13.3	13.2	7.3	7.8	7%	6%	3.4%	3.3%	397.8	413.3	40.8	48.3	74.6	77.7
Glanbia	24.97	1.61	1.76	15.5	14.2	11.3	10.2	5%	6%	1.0%	2.1%	4223.7	4441.5	435.7	472.9	553.9	590.3
Glanvagh Properties	2.36	0.21	0.23	11.2	10.3	8.4	7.1	15%	11%	0.0%	0.0%	1074.4	1132.6	141.5	149.0	145.3	152.9
Grafton Group	954.10	74.47	84.04	12.8	11.4	6.3	5.8	5%	8%	4.0%	4.1%	2696.2	2840.8	169.7	182.9	333.7	350.9
Greencoat Renewables	0.76	0.05	FALSE	14.8	FALSE	20.7	FALSE	18%	FALSE	9.1%	FALSE	30.0	FALSE	100.7	FALSE	66.7	FALSE
Greencore	248.60	20.07	24.02	12.4	10.4	7.9	5.9	9%	11%	1.2%	1.9%	3374.4	4091.1	191.2	248.5	336.3	429.9
Group	1211.00	126.55	127.20	13.7	13.6	5.8	5.4	5%	7%	4.0%	4.0%	2281.1	2407.4	192.7	198.4	377.1	399.5
Hammerman	346.00	23.24	25.54	14.8	13.5	9.0	8.0	3%	4%	5.1%	5.5%	227.4	242.5	190.0	203.2	188.8	203.1
Hastellens Materials	154.95	12.79	14.44	12.1	10.7	7.6	6.9	9%	9%	2.6%	2.8%	22179.1	23585.4	3478.8	3856.3	4850.8	5280.2
Hostelworld Group	113.00	0.13	0.18	10.3	7.5	6.6	4.6	12%	18%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9
Howden Joinery	743.50	52.56	56.26	14.1	13.2	8.5	7.8	6%	7%	3.0%	3.2%	2574.3	2735.6	390.3	423.3	553.2	598.3
IAG	419.70	0.61	0.77	8.1	6.4	3.9	3.5	12%	10%	2.1%	2.3%	33801.5	35574.1	4244.1	4903.0	6855.6	7655.9
Ibstock	79.00	-3.63	5.35	nm	14.8	8.1	6.8	9%	9%	1.4%	3.4%	368.8	390.7	14.5	37.1	58.8	68.3
ICI	7.92																
IBES BEIT	1.07	0.18	0.15	6.9	7.1	0.8	0.7	3%	3%	5.1%	5.5%	68.2	72.7	105.0	104.9	102.4	102.4
I D Wetherspoon	782.50	39.18	48.69	20.0	16.1	8.3	7.8	7%	7%	1.5%	1.5%	2222.7	2324.0	129.9	131.3	235.9	246.8
Jet2	1455.00	190.52	113.44	7.6	12.8	1.1	2.2	21%	nm	1.2%	1.2%	7618.1	8026.6	437.5	226.8	777.1	618.5
Kerry Group	83.50	5.13	5.71	16.3	14.6	12.2	11.1	5%	5%	1.8%	2.0%	6861.7	7165.4	952.5	1039.5	1265.9	1357.0
Kingfisher	288.50	23.42	25.14	12.1	11.5	5.3	4.9	10%	9%	4.4%	4.3%	12845.0	12829.6	651.0	687.4	1327.0	1353.7
Kingspan	102.50	4.40	5.73	23.3	17.9	15.3	11.9	3%	4%	0.6%	0.7%	10411.9	12311.4	1062.1	1356.0	1419.1	1780.0
Lottomatica Group	27.33	0.00	2.23	nm	12.3	8.9	8.2	6%	8%	2.1%	2.6%	2411.0	2578.1	767.7	846.3	965.5	1055.3
Lufthansa	7.72	0.97	1.07	7.9	7.2	7.9	7.5	22%	17%	3.8%	4.2%	42165.6	42688.5	1640.1	1942.4	2981.2	3180.3
Marston's	47.55	8.78	9.99	5.4	4.8	7.0	6.6	17%	16%	0.0%	4.2%	900.3	916.6	164.6	170.4	210.0	215.8
Mitchells & Butlers	267.50	31.43	33.14	8.5	8.1	6.0	5.7	5%	6%	0.0%	0.0%	2795.4	2886.3	331.2	340.0	470.4	483.3
Morrell	825.80	0.51	0.63	19.0	15.3	8.9	7.3	nm	3%	3.9%	3.3%	8403.7	8758.3	369.8	543.3	860.1	1084.3
Origin Enterprises	4.28	0.54	0.55	8.0	7.8	5.5	5.0	nm	12%	4.2%	4.5%	2166.0	2268.3	86.3	87.5	118.2	121.3
Permanent TSB	2.95	0.23	0.27	13.1	10.9	0.7	0.7			2.4%	4.1%	708.5	762.2	191.4	219.9		
Persimmon	1107.00	99.27	99.14	11.2	11.2	0.9	0.9	nm	5%	3.6%	3.8%	4127.6	4344.5	485.1	489.5	509.4	517.1
Playtech	404.00	0.37	0.31	12.6	15.3	1.0	1.0	7%	6%	0.0%	0.0%	823.2	857.2	174.9	153.2	276.6	259.9
Rank Group	87.10	9.81	10.33	8.9	8.4	4.5	4.2	5%	9%	3.4%	3.8%	852.6	919.9	67.6	71.2	123.4	129.6
Ryanair	22.64	2.12	1.76	11.9	14.9	6.5	6.3	6%	6%	1.7%	2.1%	15544.3	15843.0	2459.2	2009.3	3832.6	3569.4
Sainsbury's	4.22	2.06	3.22	21.1	13.4	7.1	6.1	6%	8%	4.2%	4.5%	32928.6	34602.3	2193.5	2952.5	5076.6	5814.9
SSE Group	184.80	13.90	16.67	13.3	11.1	6.7	6.2	5%	6%	6.7%	3.2%	3025.4	3970.6	292.7	330.2	630.5	677.8
Tate & Lyle	558.00	40.50	36.60	11.2	15.2	7.4	8.6	8%	7%	4.4%	3.5%	2006.0	2005.1	287.0	267.5	415.0	400.7
Taylor Wimpey	77.82	5.25	5.52	14.8	14.1	0.7	0.7	4%	2%	3.1%	3.5%	3871.8	4095.9	287.9	296.1	294.2	303.7
Travis Perkins	587.50	27.94	33.49	21.0	17.5	6.8	6.3	7%	3%	2.0%	2.4%	4520.8	4628.6	116.2	132.9	267.6	289.7
Unishar	3.90	0.27	0.28	14.4	13.9	8.8	6.4	nm	6%	0.5%	0.5%	3214.9	3361.7	110.7	115.5	148.3	165.7
Viatry Group	268.20	43.09	49.03	6.2	5.5	2.3	1.6	41%	27%	0.0%	0.0%	3784.1	3942.4	276.8	290.5	348.2	397.2
Wii Smith	374.20	39.76	37.96	9.4	9.9	5.4	5.1	nm	4%	0.0%	0.0%	1589.6	1610.8	111.4	115.5	164.2	168.4
Whitbread	2347.00																
Winkles Group	180.80	30.98	24.54	8.6	7.4	4.9	4.3	5%	10%	6.6%	7.7%	1684.9	1766.1	83.1	90.0	202.5	219.5
Wizz Air	1016.00	0.01	-3.47	1426.2	nm	8.0	6.6	47%	34%	0.0%	0.0%	5691.4	6585.3	139.7	-350.3	1318.3	1013.6

Closing prices as of: 13/09/2026